



e-Mall Receiving

May 2019



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RECEIVING OVERVIEW

Receiving allows you to track the receipt of item. The functionality provides the ability to partially or completely accept goods and/or services, or reject items/services. The receiver of the goods/services is also the *approver* of the receipt. The approval is automatic when the receipt is processed. (Ad hoc approvers can be added to the receipt.)

There are two **types** of receiving: **Desktop** Receiving and **Central** Receiving. The type of receiving used is determined by the setup of the BuysenseOrg (BSO) to which your user profile is assigned.




*In **Desktop** Receiving*, the requester of the requisition is authorized to process the receipt(s) when goods or services are delivered. ONLY the requester can receive against the order. This means that if the preparer is NOT the requester (the preparer name does not appear in the 'on behalf of' field on the requisition), the preparer will not be able to receive against the order they initiated.

*In **Central** Receiving*, a designated user (e.g. an employee at a central warehouse) receives the goods or services on behalf of the requester. The requester of the requisition cannot do receiving if the receiving role is assigned to the applicable requester's BSO (Buysense Org).

There are two **methods** of receiving: receive by **Quantity** and/or receive by **Amount**. The default method is Quantity. A user within an entity authorized to Receive by Amount, however, will have the option to change the method to Amount for any given line.

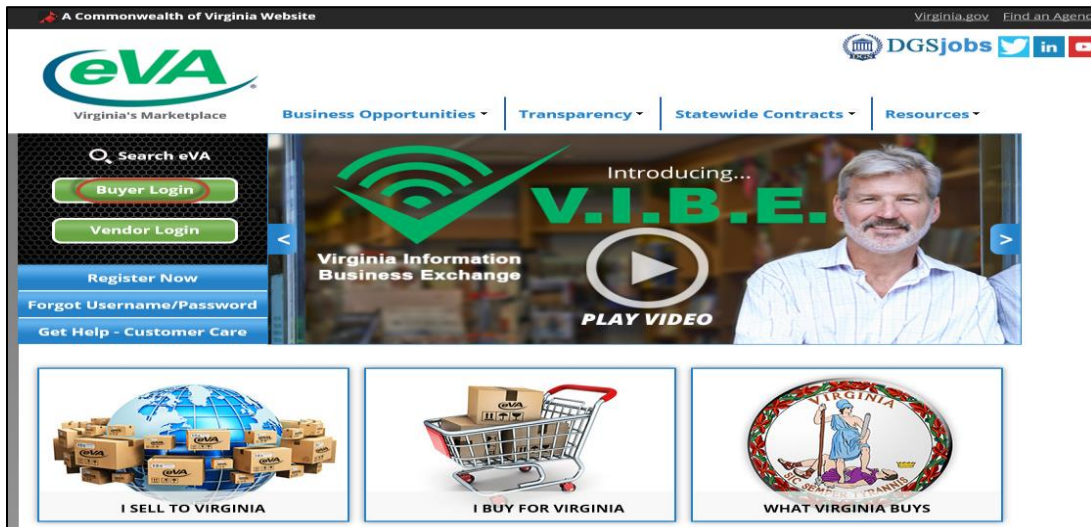
IMPORTANT- If the user's BSO changes for receiving, the official receiver on any remaining receipts for an order may likely be different than the former receiver. Always check the Approval Flow tab on the receipt to determine responsible approver. *See Important Notes at end of document.*

Receiving phrases and descriptions:

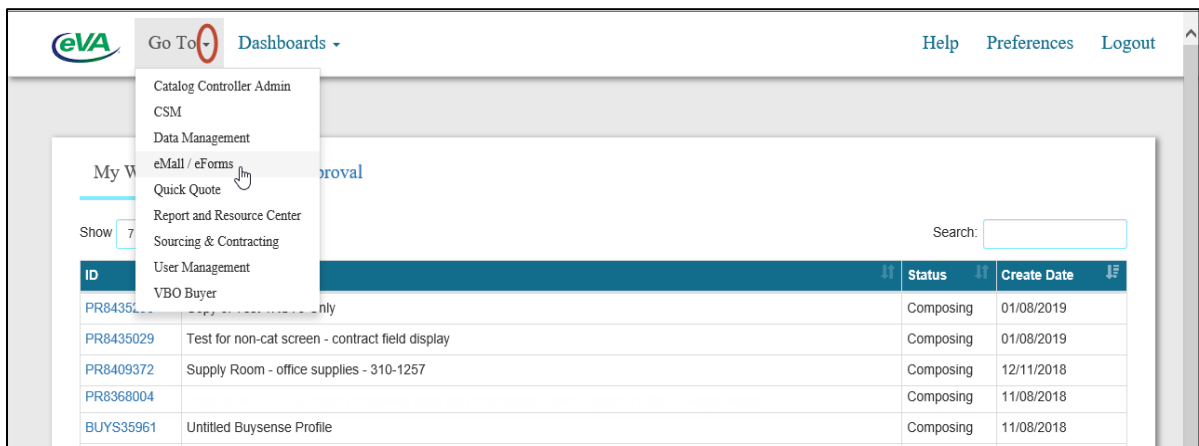
-  **Reopen Closed Order** – A 'Reopen Order' button is provided for situations where changes must be made on requisitions and the order has been fully received.
-  **Rejected Items** – A 'Reject' field is provided for situations where an item is received but not yet recorded as having been received, and must be returned to the vendor for some reason (defective/not ordered, etc.). This field should NOT be used for items that need to be returned *after* the item(s) has been recorded on a prior receipt.
-  **Negative Receiving** – The "Accept/Return" field is used for situations where item(s) are accepted but is also used to back out items previously received. Backing out items may be necessary to: 1) denote return item(s) to the vendor *or*, 2) open the requisition to allow for a change to Quantity and/or Unit price.

PROCESSING RECEIPTS

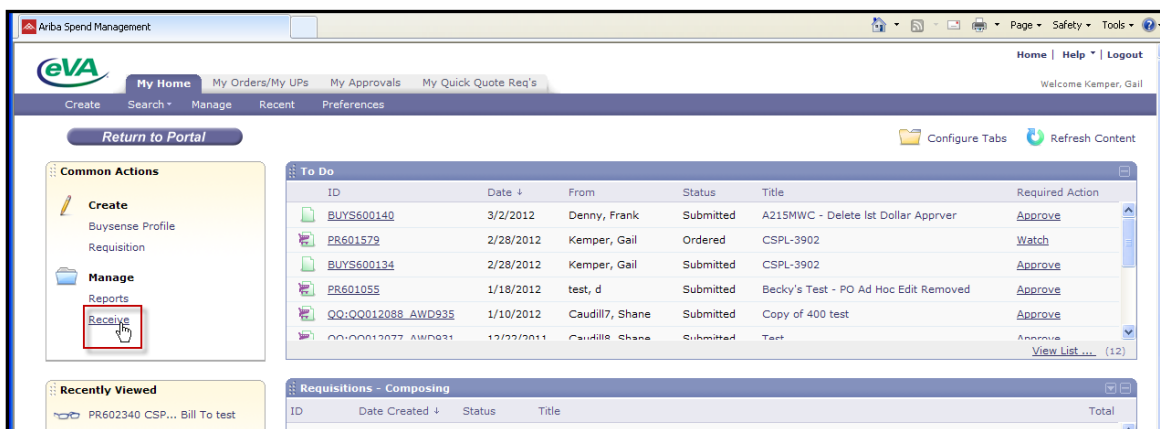
1. Access the eVA Home Screen (www.eva.virginia.gov) and enter your Buyer login credentials.



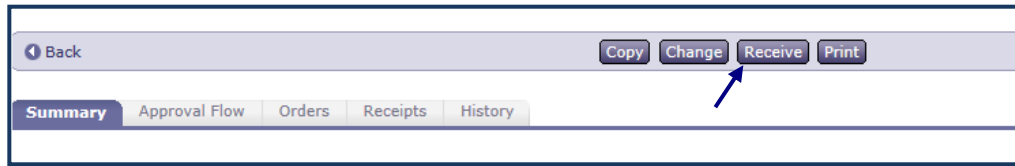
2. When the below screen appears, click the arrow next to 'Go To' then select eMail / eForms



3. When the eMail home screen appears, click the Receive link under 'Manage', as shown.

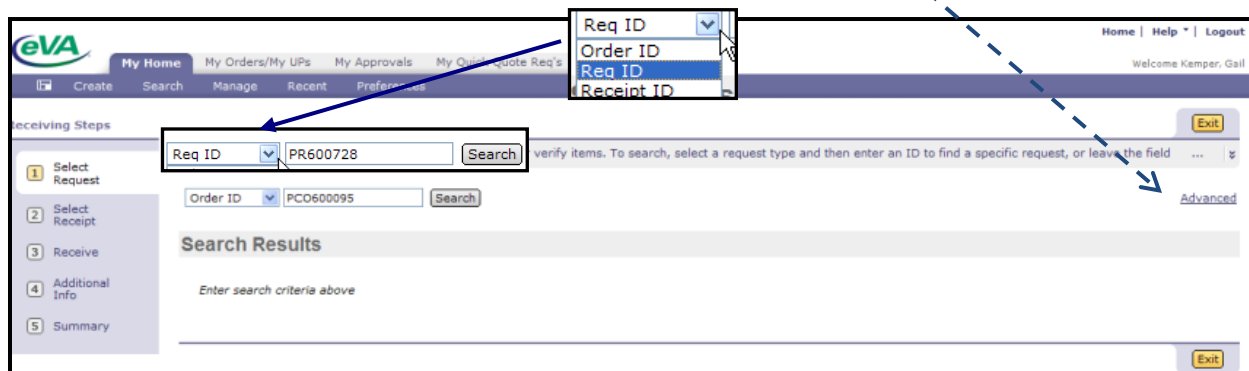


NOTE: If you are a desktop receiver, and your name appears in the 'on behalf of' field of the requisition, you can access receiving by clicking the RECEIVE button when you open the requisition.

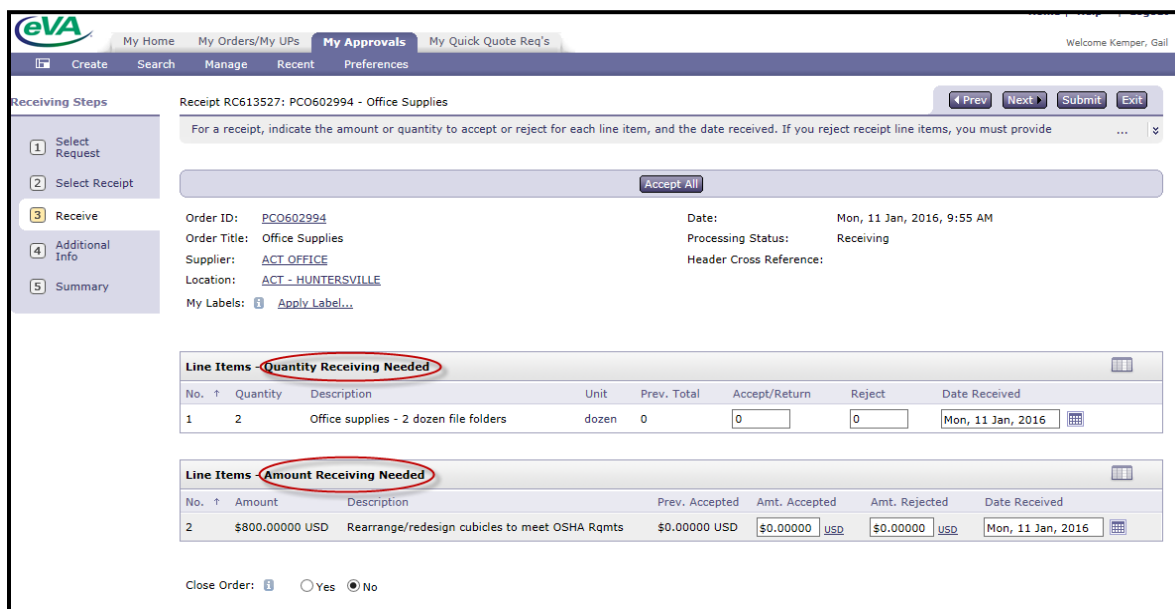


4. Enter the desired ID (OrderID, ReqID, or ReceiptID) in the Search field and click the Search button.

NOTE: The Advanced option also offers filters such as Supplier, Status, Order Title, Requisition Preparer or Requester, etc.



It's possible to see lines on an order showing both Quantity and Amount receiving method, as illustrated:



5. Take the appropriate action to record receiving:

- a. To receive all items on the order:
 - (1) Click the 'Accept All' button.

(2) If receive date must be adjusted, see 'Prior Receive Date' below.

b. To record partial receiving on the order:

(1) Enter the quantity or amount (whichever is applicable), in the Accept/Return field.

(2) If receive date must be adjusted, see 'Prior Receive Date' below.

Receiving Steps

Receipt RC620220: PCO603031-V2 - CSPL-9443 - using gkemper's pcord during delegated approval authority

For a receipt, indicate the amount or quantity to accept or reject for each line item, and the date received. If you reject receipt line items, you must provide comments to ...

Accept All

Order ID: PCO603031-V2
Order Title: CSPL
Supplier: ACT OFFICE
Location: RICHMOND LOCATION
Date:
Processing Status: Receiving
Header Cross Reference:
ERP PO Number:
ERP Receipt Number:
My Labels: [Apply Label...](#)

No.	Quantity	Description	Unit	Prev. Total	Accept/Return	Reject	Date Received
1	10	* - * - Abrasives	box	0	0	0	Wed, 1 May, 2019
2	10	* - * - Footballs	each	0	0	0	Wed, 1 May, 2019

Edit Receive Date:

Select ALL Lines: ☐

Enter New Date:

Update

Close Order: ☐ Yes ☒ No

COMMENTS - ENTIRE RECEIPT

Prior Receive Date

If the item/service was received prior to displayed date, enter the correct date in the Date Received column, or, if working multiple items:

- Click the 'Select ALL Lines' checkbox
Deselect lines not applicable to prior date.
- Add the applicable receive date in the 'Enter New Date:' field
- Click the Update button.

No.	Quantity	Description	Unit	Prev. Total	Accept/Return	Reject	Date Received
1	10	* - * - Abrasives	box	0	0	0	Wed, 1 May, 2019
2	10	* - * - Footballs	each	0	0	0	Wed, 1 May, 2019

Edit Receive Date:

Select ALL Lines: ☐

Enter New Date:

Update

The new receive date will populate on chosen line items.

- c. If an item is received damaged, or should not have been sent by the vendor, upon immediate receipt of item(s),
 (1) Denote the quantity rejected in the REJECT field, as shown below.
 (2) If receive date must be adjusted, see 'Prior Receive Date' above.

Receiving Steps: 1 Select Request, 2 Select Receipt, 3 Receive, 4 Additional Info, 5 Summary

Receipt RC600347: PCO600099 - Copy of Logi Ad Hoc Vendor Test-Script 2438

Order ID: PCO600099 Date: Tue, 3 Apr, 2012, 1:33 PM
 Order Title: Copy of Logi Ad Hoc Vendor Test-Script 2438 Processing Status: Receiving
 Supplier: New Ad Hoc Vendor Header Cross Reference: Ad hoc vendor
 Contact: New Ad Hoc V
 My Labels: Apply Label...

No.	Quantity	Description	Unit	Prev. Total	Accept/Return	Reject	Date Received
1	10	Social Director Banquet	each	0	0	5	Tue, 3 Apr, 2012
2	10	Socialites for Banquet	each	0	0	0	Tue, 3 Apr, 2012

Close Order: ☐ Yes ☒ No

COMMENTS - ENTIRE RECEIPT

- (3) Enter a rejection reason, where indicated.

Receiving Steps: 1 Select Request, 2 Select Receipt, 3 Receive, 4 Additional Info, 5 Summary

Receipt RC601800: PCO600095 - TEST for email Approver Access

Order ID: PCO600095 Date: Tue, 28 Jul, 2015, 11:42 AM
 Order Title: TEST for email Approver Access Processing Status: Receiving
 Supplier: VBUSE NAME CHANGE Header Cross Reference:
 Location: VBUSE
 My Labels: Apply Label...

No.	Quantity	Description	Unit	Prev. Total	Accept/Return	Reject	Date Received
1	15	Vita contract categories mandvita	each	9	0	3	Tue, 28 Jul, 2015

Email: ☐ Send email to Purchasing

Rejection Reason: Items received damaged; being sent back.

NOTE: The Reject field should NEVER be used to record a 'return' after the product or service has been received on a prior receipt. If this was mistakenly done, back out the erroneous quantity (i.e.-5) in the Reject field after the erroneous receipt processes.

6. Review the Summary screen to ensure accuracy.

NOTE: The Close Order field defaults to 'No' button. Leave as is.

7. If desired, an additional approver can be added to the receipt by clicking the 'Add Approver' on the Approval Tab. (See important information in the 'Approving Receipts' section of this document).

Receiving Steps

Receipt RC613830: PCO603007

Review the receipt, make changes as necessary, and then submit it for approval.

Summary Approval Flow

Order ID: PCO603007 Date: Tue, 2 Feb, 2016, 9:26 AM

Order Title: Coffee Processing Status: Receiving

Supplier: OLIVIA AND COMPANY Header Cross Reference:

Location: OLIVIA PHOENIX

My Labels: Apply Label...

Line Items - Amount Fully Received

No.	Amount	Description	Prev. Accepted	Amt. Accepted	Amt. Rejected	Date Received
1	\$882.00000 USD	Folgers Classic Roast Ground Coffee, 30.5 oz.	82.00000 USD	\$0.00000 USD	\$0.00000 USD	Tue, 2 Feb, 2016

Close Order: Yes No

COMMENTS - ENTIRE RECEIPT

Comments/Attachments can be added

Comments:

ATTACHMENTS - ENTIRE RECEIPT

8. Click the Submit button.

Based on your default Preference setup, one of the two below screens will appear.

Receiving - Done

You successfully received the selected items. Continue receiving or return to the home page.

EP619514 - CSPL has been received.

- Select another request to receive
- Return to the Ariba Buyer Home page

☐ Don't show this page again (to reset, click Preferences).

Receiving Steps

Search for and then select requests for which to receive or verify items. To search, select a request type and then enter an ID to find a specific request, or leave the field ...

Order ID Search

Search Results

Enter search criteria above

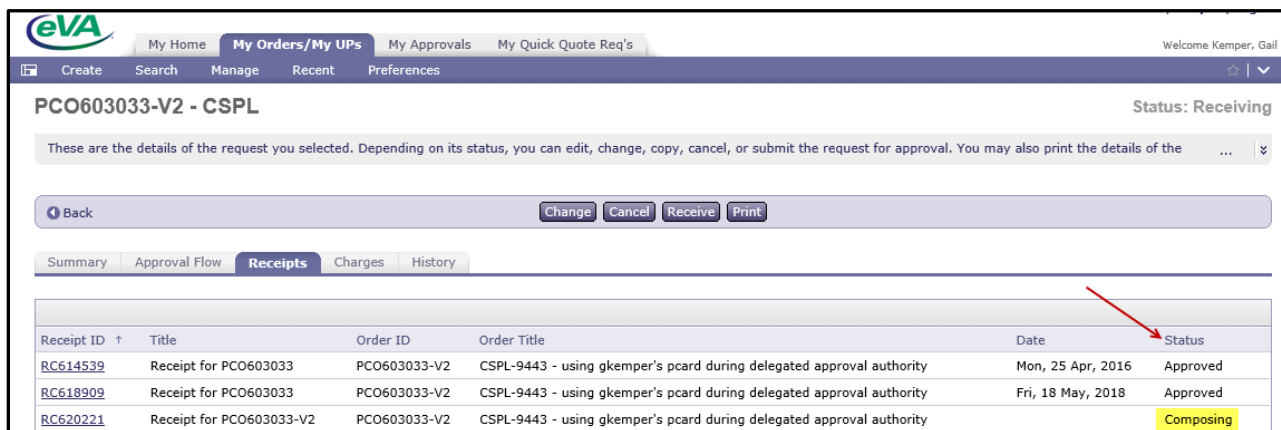
Let's look at the receipt audit trail!

In the below 'My Documents' window, several requisitions appear in Receiving status, indicating partial or prior receiving. *If all items were received, the requisition would be in Received status.*



ID	Title	Date	Status
PR561004-V3	New test for Refresh Content - Jan 5 12	4/6/2012	Receiving
PR600797-V2	The Supply Room Co	4/6/2012	Receiving
PR602755	CSPL-4049-Test #2	4/5/2012	Composing
BUYS600164	CSPL-3167	4/3/2012	Approved
PR602340	CSPL-3595-on behalf of Bill To test	3/28/2012	Ordered
BUYS600138	Recreate CSPL-3007 changes (default values were removed)	2/28/2012	Approved

In the below example, a user opened an order from the My Orders/MY UPs' tab from the eMail Home screen. As the Receipts tab of the order shows, the formerly processed receipts appear, as well as a NEW receipt in composing status; awaiting further processing. *(When a receipt processes for partial receiving, the system always creates a new composing receipt in preparation for additional receiving.)*



PCO603033-V2 - CSPL Status: Receiving

These are the details of the request you selected. Depending on its status, you can edit, change, copy, cancel, or submit the request for approval. You may also print the details of the ...

Back Change Cancel Receive Print

Summary Approval Flow Receipts Charges History

Receipt ID	Title	Order ID	Order Title	Date	Status
RC614539	Receipt for PCO603033	PCO603033-V2	CSPL-9443 - using gkemper's pcard during delegated approval authority	Mon, 25 Apr, 2016	Approved
RC618909	Receipt for PCO603033	PCO603033-V2	CSPL-9443 - using gkemper's pcard during delegated approval authority	Fri, 18 May, 2018	Approved
RC620221	Receipt for PCO603033-V2	PCO603033-V2	CSPL-9443 - using gkemper's pcard during delegated approval authority		Composing

APPROVING RECEIPTS

There are no required approvals for receipts *unless a receiver enters an approver*. If the receiver inserts an approver in the workflow before the box showing the regular receiver, that approver can only find the receipt after it's submitted by going into the RECEIVE screen and searching for the order. If, however, the receiver inserts the approver after the regular receiver, the receipt (RC) will appear in the 'To Do' pane of the eMail home screen. An email notification is NOT sent to the receiver stating an order is ready to be received. The only approver to receive a notification will be one added to the workflow *AFTER* the regular receiver.

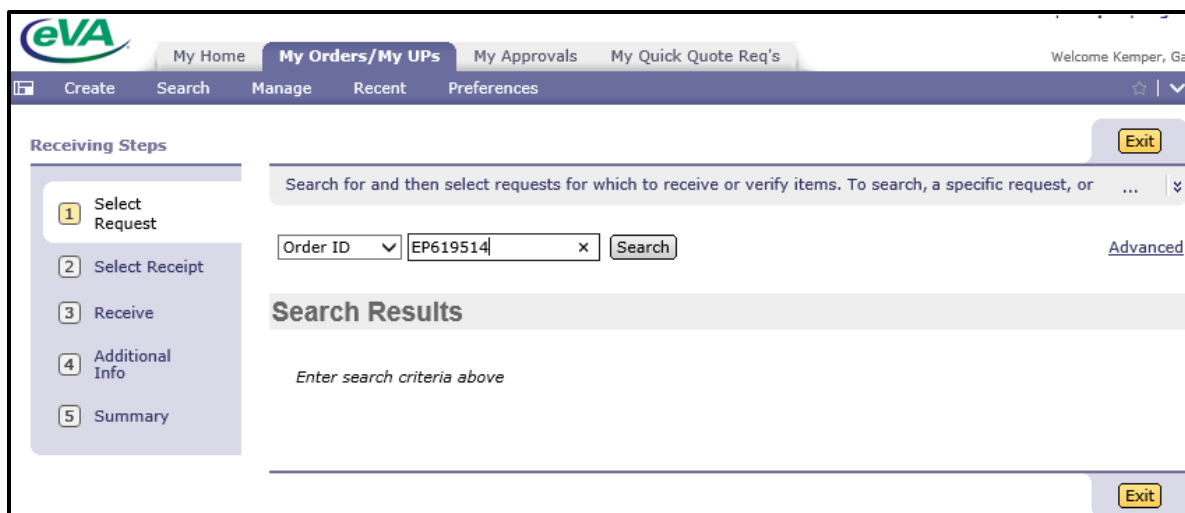
REOPENING CLOSED ORDERS

Once closed, it may be necessary to REOPEN an order so change(s) can be processed against the associated eVA requisition.

1. Click the Receive link on the eVA eMail 'My Home' page.



2. When the below screen appears, enter the order number in the Search field, as shown. If the order number is unknown, a Requisition number (ReqID) or Receipt number (Receipt ID) can be entered by accessing the drop- down menu to select an alternate search type. (Ignore Contract ID)



3. When the applicable screen appears, click the 'Reopen Order' button.

The screenshot shows the 'Receiving Steps' for ERP Order EP619514. The 'Reopen Order' button is highlighted with a red circle. The order title is 'CSPL-9125-Normal title but there's a spider in the supplier comment'. The status is 'Approved'.

Receipt ID	Order ID	Title	Date	Status
RC619593	EP619514	CSPL-9125-Normal title but there's a spider in the supplier comment	Thu, 2 May, 2019, 10:06 AM	Approved

Order ID: EP619514
Version: 1

4. Take the below action according to your situation:

- If you do not need to record a negative quantity or amount, click the Exit button.
- If you must adjust quantity or amount recorded on a previous receipt, open the Composing Receipt ID.

The screenshot shows the 'Receiving Steps' for ERP Order EP619514. The 'Composing' button is highlighted with a yellow box. The order title is 'CSPL'. The status is 'Composing'.

Receipt ID	Order ID	Title	Date	Status
RC620325	EP619514	CSPL		Composing
RC619593	EP619514	CSPL	Thu, 2 May, 2019, 10:06 AM	Approved

Order ID: EP619514

(1) Make the necessary negative line adjustments on the receipt.
If items must be re-received after the changed requisition is approved, make a note of the original RECEIVED date of each line.
Ensure the Close Order button is set to 'No'.

Close Order: ☒ Yes ☐ No


(2) Click the Submit button.

The screenshot shows the 'Receiving Steps' for Receipt RC617488. The 'Submit' button is highlighted with a yellow box. The order title is 'Script 520 - Ariba9r2-Cat & Non-Cat Items; nc w/contract (Kemper)'. The status is 'Receiving'.

No.	Quantity	Description	Unit	Prev. Total	Accept/Return	Reject	Date Received
1	13	Cardinal Health ~ Bandages, Catheters, Etc.	each	13	-13	0	Wed, 13 Sep, 2017

Close Order: ☐ Yes ☒ No

When you return to the eMall Home screen, the requisition and order will be in Receiving status, regardless whether all items are 'backed out'.

Search Results		Found 56 items					
<input type="checkbox"/>	↑ Type ID	Title	Status	Date Created	Total		
<input type="checkbox"/>	 PR626217	Ariba9r2 Inflight tests - Script 253 - take to Rcvg status	Receiving	12 Mar 2017	\$149.00000 USD		

When finding applicable requisition number and clicking the PR ID, the Change button will be viewable.

If necessary to re-receive item(s) after the changed requisition has been fully approved, go back into Receiving and process the receipt, entering the original receiving date(s). *The mass edit feature may prove helpful in making this change.*


Caution:

If an attempt is made to process a new composing RECEIPT too soon after an RC has been submitted, the below screen may appear. Wait at least 15-20 minutes before Reopening the order and exiting.

Confirm Exit
You are in the process of editing RC613697 - Receipt for EP613019. Choose what you would like to do next.

- [Undo](#) any changes
- [Continue](#) working on this request
- [Print](#) a copy of this request

IMPORTANT RECEIVING INFORMATION

- 
- BSO is a term used to designate the unit/division/department associated with an eVA user's account. The receiving process can be either Central Receiving or Desktop receiving (receiving completed by the requestor), based on the requester's BSO. If the BSO has Central Receiving for receiving, anyone assigned to the Central Receiving role can receive against orders initiated by requesters within that BSO. It's important to understand that the initial receipt is created *at the time the order is created* and will use the BSO setting for receiving *at that time*. If the receiving field of the BSO is changed from Central Receiving to Desktop receiving (or vice versa), and a partial receipt is processed after the BSO change, the next receipt (in composing status), will require that receiving be done by the NEW receiver. This situation could also occur if the requester is moved to a different BSO with different receiving setup.

REMINDER: Whatever the receiving field reflects on the BSO for that requester at the time of receipt creation will necessitate *that* type of receiving for the receipt(s); either Central Receiving or Desktop.*

*HELPFUL HINT: If the BSO receiving field was switched from Desktop to Central Receiving, the requester can be assigned the applicable Central Receiving role to complete receiving.

- The same Central Receiving role can be assigned to multiple BSO's.
- After a requisition is submitted, a Receipts tab appears as one of the Tabs on the requisition.

Summary Approval Flow Orders Receipts History

NOTE: The Requisition History tab does not contain date/time details for receipts; the Receipts tab does.

- The receiving method (quantity or amount), is determined by selection made by the requisition preparer on the line item(s). The default is quantity. If this option is not available, consult your eVA Entity lead or DPS Account Executive.
- A receipt could potentially have a mix of receiving methods. Some items may be designated for receiving by Quantity, while other items might specify receiving by Amount.
- All quantities/amounts that must be backed out on a receipt should be entered as a negative number in the **Accept/Return** field. (e.g. -10 or -\$300.00).

COMMON MISTAKE! Do NOT enter a quantity/amount in the REJECT field if that item has already been recorded as RECEIVED on a prior receipt.

- Processed receipts will show the new/adjusted quantity or amount in the "Prev. Total" field.
- A PR can be cancelled if ALL items previously received on the PR are completely backed out.

CAUTION: If multiple orders to different vendors exist on the same requisition, canceling the requisition will cancel ALL orders associated with the requisition. Instead, create a change to decrease the quantity on the applicable line item(s) to zero (0).

- To accurately process a change to a requisition, the order associated with the change must first be reopened, and, if applicable, prior receiving BACKED out. Even if *all* receiving is backed out, the below changes cannot be done on a requisition, if it is greater than version 2 requisition (vs2).

- Supplier name and/or supplier location
 - Method of payment (changing from a pcard to invoice OR vice versa)
 - Billing address
 - Order delivery (Print to Electronic or vice versa)
- ✚ To process a PRICE change on a non-catalog item previously received, it will be necessary to back out quantities/amount previously received by doing negative receiving on the item(s).
 - ✚ Receivers are discouraged from closing an order *short*. (Clicking the close button.) An adjustment should be made to the requisition if the item(s) will not be delivered or replaced. If a change requisition is processed to reflect a quantity that equals the total adjusted received quantity/amount, the PR will automatically move to Received status.
 - ✚ Once any receiving is processed, the requisition will never revert back to Ordered status, even if all items are backed out.
 - ✚ If applicable, re-receive items after a changed requisition is fully approved. NOTE: Past receipts will provide receive date(s). The Mass Edit feature can aid in quickly recording proper previous dates.
 - ✚ There is no concept of 'Delegating your Receiving Authority'. No role or action will allow anyone other than the authorized receiver (requester [aka desktop] or Central Receiver) to receive the order.
 - ✚ If an EDIT button displays after clicking the Receipt#, it could mean one of two things: the user is not the official receiver yet has an 'eVA-EditApprovable' role that allows them to edit the receipt (check Approval Tab to view authorized receiver), OR it the appropriate receiver is viewing the receipt by clicking through the requisition, then onto to the Receipt tab, and choosing a receipt. (This option allows the requester to view a receipt without being put into the receiving mode where receiving is expected.) NOTE: If an unauthorized person edits a receipt, that receipt will NOT process until the authorized receiver goes into Receive module, pulls up that receipt, and clicks Submit.
 - ✚ Refer to the Report and Resource Center for helpful receiving reports, as shown on the next page.

There are a number of ways to determine orders that are still outstanding.

You can choose a variety of reports (e.g. 200, 201, 202, 208) and select the status of 'Ordered' and/or 'Receiving' for a past time period to view which orders have not yet been fully received.

The 211 Order Receiving Details report can prove especially helpful to Accounts Payable personnel for viewing receipts that have processed within a designated time period. Additionally, a specific receipt can be opened and printed from this report.

The 203 View or Print Orders(s) Report provides detail information such as line item descriptions, approvers and approval dates, receiving details, and accounting code distribution.

Go To ▾ Dashboards ▾
Help Preferences Logout

Catalog Controller Admin
CSM
Data Management
eMail / eForms
Quick Quote
Report and Resource Center
Sourcing & Contracting
User Management
VBO Buyer

My Work
Show 7

ID	
DGS-SS	
DGS-SS3238	Copy of A161TAX -
DGS-SS3237	EVA1ADMIN - Sole
DGS-SS3227	EVA1ADMIN - Sole
PR8566707	VITA contract test -
PR8521041	Copy of Supply Order
PR8435029	Test for non-cat scre

Showing 1 to 7 of 16 entries

Buyer Reports

Vendor Data

- 100 Vendor Data by NIGP Code
- 101 General Vendor Information
- 102 Vendor Location for Specific Order
- 1010 Vendor Active Ordering Location Address-D30

Spend Analysis

- 200 Order Details with Accounting/Receiving
- 201 Order Totals - No Accounting
- 202 General Order Information
- 203 View or Print Order(s)
- 204 Spend by NIGP Class
- 205 Spend Summary-Registered vs. Non-Registered Vendors
- 206 Spend Totals with SWAM Breakout
- 207 Total Vendor Spend by BSO
- 208 Order Line Item Details
- 209 SWAM Vendor Summary with FY Totals
- 210 Spend by User for Time Period
- 211 Order Receiving Details**
- 212 Total Order Count and Spend Summary
- 213 Top Vendor List
- 215 Orders Created with Vendor as Un-Registered
- 216 Services Spend by Vendor

Approver Analysis

- 300 Approval Cycle Time on eVA Requisitions

Top 20 Communities

Small Business Spend

Vendor Notifications